

**California Automated Response and Engagement System (CWS-CARES)  
Resource Family Application (RFA) Project**



# **Document Control**

May 2022  
Quick Guide 13  
Version 2.0

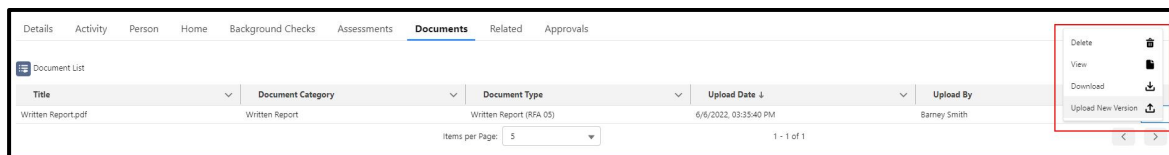


## Revision History

Revision / Version #	Date of Release	Author	Summary of Changes
1.0	5/19/2022	Barney Smith	Initial draft
2.0	6/3/2022	Lori Savageau	ADA Revisions

## To upload a document, start from the Application page.

1. Click the **Documents** tab. The Documents tab displays.
2. Click the **Upload** button. The Upload document page displays.
3. Click the **Document Category** dropdown list and select the **category**.
4. Click the **Document Type** dropdown list and select **document type**.
5. Click the **Document Status** dropdown list and select **Draft or Final**
6. Click the **Upload Files** button. The Windows Explorer page displays
7. Navigate to the **document** and select it.
8. Click the **Open** button. You are returned to the **Documents** tab. The document name displays, and the **Upload** button is enabled.
9. Click **Upload**. Now you can see the document you uploaded. **NOTE:** There is additional functionality available when you click the right arrow next to a document.



- **Delete** allows anyone with the proper permissions to delete a document
- **View** will open a page to view all versions of the document
- **Download** allows the user to download a copy of the document
- **Update New Version** allows the user to update a new version. **NOTE:** you cannot upload a document with the same name as one that has already been uploaded. You must upload a new version or change the name.

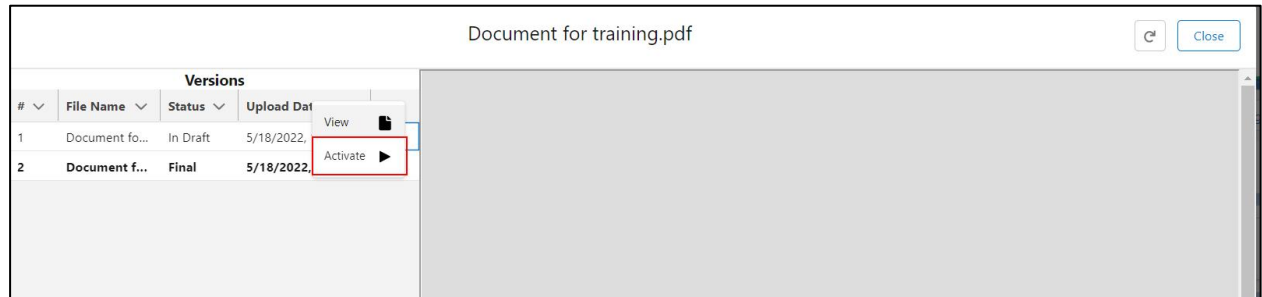
## To upload a New Version, start from the Document tab.

1. Click the dropdown arrow for the **Document** and select **Upload New Version**. The **Upload** page displays
2. Click the **Choose File** button. The **Windows Explorer** page displays.
3. Navigate to your document, select it and click **Open**. The **Upload** page displays
4. Click the **Upload** button. The green upload successful message displays.

## To View Document Versions, Start from the Documents tab.

1. Click the down arrow next to the document and select **View**. The version page displays.

2. To change the **Active Version**, click the **down arrow** next to the document you want to be activate. Select **Activate**. That version is now bold and is the new active document.



### To Change the Status of a Document, Start from the Documents tab.

1. Click the **down arrow to the right of the document** you want to change the status on and select **Update Status**. The Status Update popup displays
2. Click the **Document Status** dropdown and select either **Draft** or **Final**.

### To Delete a Document, Start from the Documents tab.

1. Click the **down arrow to the right** of the document you want to change the status on and select **Delete**.
2. Click **Delete** on the popup window.